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ABSTRACT

This twentieth in a series of twenty-nine learning modules on instructional execution is designed to give secondary and postsecondary vocational teachers help in locating and evaluating community resources, determining when and how to use a subject matter expert in the vocational program, and conducting a presentation session in which a subject matter expert is involved. Introductory sections relate the competencies dealt with here to others in the program and list both the enabling objectives for the three learning experiences and the resources required. Materials in the learning experiences include required reading, a self-check quiz with model answers, performance check lists, and the teacher performance assessment form for use in evaluation of the terminal objective. (The modules on instructional execution are part of a larger series of 100 performance-based teacher education (PBTE) self-contained learning packages for use in preservice or inservice training of teachers in all occupational areas. Each of the field-tested modules focuses on the development of one or more specific professional competencies identified through research as important to vocational teachers. Materials are designed for use by teachers, either on an individual or group basis, working under the direction of one or more resource persons/instructors.) (BM)

ED149084

MODULE

C-20

Use Subject Matter Experts to Present Information

MODULE C-20 OF CATEGORY C—INSTRUCTIONAL EXECUTION
PROFESSIONAL TEACHER EDUCATION MODULE SERIES

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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FOREWORD

This module is one of a series of 100 performance-based teacher education (PBTE) learning packages focusing upon specific professional competencies of vocational teachers. The competencies upon which these modules are based were identified and verified through research as being important to successful vocational teaching at both the secondary and post-secondary levels of instruction. The modules are suitable for the preparation of teachers in all occupational areas.

Each module provides learning experiences that integrate theory and application; each culminates with criterion referenced assessment of the teacher's performance of the specified competency. The materials are designed for use by individual or groups of teachers in training working under the direction and with the assistance of teacher educators acting as resource persons. Resource persons should be skilled in the teacher competency being developed and should be thoroughly oriented to PBTE concepts and procedures in using these materials.

The design of the materials provides considerable flexibility for planning and conducting performance-based preservice and inservice teacher preparation programs to meet a wide variety of individual needs and interests. The materials are intended for use by universities and colleges, state departments of education, post-secondary institutions, local education agencies, and others responsible for the professional development of vocational teachers. Further information about the use of the modules in teacher education programs is contained in three related documents: **Student Guide to Using Performance-Based Teacher Education Materials, Resource Person Guide to Using Performance-Based Teacher Education Materials** and **Guide to Implementation of Performance-Based Teacher Education.**

The PBTE curriculum packages are products of a sustained research and development effort by The Center's Program for Professional Development for Vocational Education. Many individuals, institutions, and agencies participated with The Center and have made contributions to the systematic development, testing, revision, and refinement of these very significant training materials. Over 40 teacher educators provided input in development of initial versions of the modules; over 2,000 teachers and 300 resource persons in 20 universities, colleges, and post-secondary institutions used the materials and provided feedback to The Center for revision and refinement.

Special recognition for major individual roles in the direction, development, coordination of testing, revision, and refinement of these materials is extended to the following program staff: James B. Hamilton, Program Director; Robert E. Norton, Associate Program Director; Glen E. Fardig, Specialist; Lois Harrington, Program Assistant; and Karen Quinn, Program Assistant. Recognition is also extended to Kristy Ross, Technical Assistant; Joan Jones, Technical Assistant; and Jean Wisenbaugh, Artist for their contributions to the final refinement of the materials. Contributions made by former program staff toward developmental versions of these materials are also acknowledged. Calvin J. Cotrell directed the vocational teacher competency research studies upon which these modules are based and also directed the curriculum development effort from 1971–1972. Curtis R. Finch provided leadership for the program from 1972–1974.

Appreciation is also extended to all those outside The Center (consultants, field site coordinators, teacher educators, teachers, and others) who contributed so generously in various phases of the total effort. Early versions of the materials were developed by The Center in cooperation with the vocational teacher education faculties at Oregon State University and at the University of Missouri-Columbia. Preliminary testing of the materials was conducted at Oregon State University, Temple University, and University of Missouri-Columbia.

Following preliminary testing, major revision of all materials was performed by Center Staff with the assistance of numerous consultants and visiting scholars from throughout the country.

Advanced testing of the materials was carried out with assistance of the vocational teacher educators and students of Central Washington State College; Colorado State University; Ferris State College, Michigan; Florida State University; Holland College, P.E.I., Canada; Oklahoma State University; Rutgers University; State University College at Buffalo; Temple University; University of Arizona; University of Michigan-Flint; University of Minnesota-Twin Cities; University of Nebraska-Lincoln; University of Northern Colorado; University of Pittsburgh; University of Tennessee; University of Vermont; and Utah State University.

The Center is grateful to the National Institute of Education for sponsorship of this PBTE curriculum development effort from 1972 through its completion. Appreciation is extended to the Bureau of Occupational and Adult Education of the U.S. Office of Education for their sponsorship of training and advanced testing of the materials at 10 sites under provisions of EPDA Part F, Section 553. Recognition of funding support of the advanced testing effort is also extended to Ferris State College, Holland College, Temple University, and the University of Michigan-Flint.

Robert E. Taylor
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THE CENTER FOR VOCATIONAL EDUCATION
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The Center for Vocational Education's mission is to increase the ability of diverse agencies, institutions, and organizations to solve educational problems relating to individual career planning and preparation. The Center fulfills its mission by:

- Generating knowledge through research.
- Developing educational programs and products.
- Evaluating individual program needs and outcomes.
- Installing educational programs and products.
- Operating information systems and services.
- Conducting leadership development and training programs.

AAVIM

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The American Association for Vocational Instructional Materials (AAVIM) is an interstate organization of universities, colleges and divisions of vocational education devoted to the improvement of teaching through better information and teaching aids.

INTRODUCTION

There are times in the professional life of every vocational teacher when some special help from an expert would be very beneficial to classroom instruction. Even the most conscientious teachers can't always keep up with the rapidly expanding technology in their occupational fields. Even the most experienced teachers are unlikely to have equal expertise in every area of the occupation. Even the most active classroom teachers can lose touch with changing conditions in the real world of work.

In many cases, inviting an outside subject matter expert into the classroom can give the vocational teacher, and of course the class, just the assistance they need. From such experts, you and the class can find out about new technology, gain skills in specialized occupational operations, and learn what is going on in the job market. In addition, subject matter experts who come into the school laboratory or classroom may bring with them fresh viewpoints and a variation in style and approach that can be stimulating to teacher and class alike.

"Subject matter experts" can include any of a number of willing people from the community who have valuable experience, specialized knowledge, or particular points of view that the class needs to be exposed to.

A personnel manager, for example, can tell the office practice class what he/she looks for in a new job applicant. A union leader can explain present and future conditions in the aircraft industry. A knowledgeable and well-traveled professional person can describe the kinds of service he or she expects from hotel and restaurant personnel. Technical information may come from a tool and die maker who can demonstrate techniques for machining unusual metals. A master craftsman may be able to pass along the art of applying a varnish finish. This kind of experience can give students information and insights they could not otherwise obtain.

This module is designed to prepare you to tap the resources available from subject matter experts. You will gain skill in (1) locating and evaluating the vast amount of expertise available in every community, (2) determining when and how to use a subject matter expert in the vocational program, and (3) conducting a presentation session in which a subject matter expert is involved.

ABOUT THIS MODULE

Objectives

Terminal Objective: In an actual school situation, use a subject matter expert to present information. Your performance will be assessed by your resource person, using the Teacher Performance Assessment Form, pp. 35–36 (*Learning Experience III*).

Enabling Objectives:

1. After completing the required reading, demonstrate knowledge of the rationale and procedures for using a subject matter expert (*Learning Experience I*).
2. In a simulated classroom or laboratory situation, use a subject matter expert to present information (*Learning Experience II*).

Prerequisites

To complete this module, you must have competency in developing a lesson plan. If you do not already have this competency, meet with your resource person to determine what method you will use to gain this skill. One option is to complete the information and practice activities in the following module:

- *Develop a Lesson Plan*, Module B–4

Resources

A list of the outside resources which supplement those contained within the module follows. Check with your resource person (1) to determine the availability and the location of these resources, (2) to locate additional references in your occupational specialty, and (3) to get assistance in setting up activities with peers or observations of skilled teachers, if necessary. Your resource person may also be contacted if you have any difficulty with directions, or in assessing your progress at any time.

Learning Experience I

Optional

The videotape, "Utilize a Subject Matter Expert," The Center for Vocational Education, The Ohio State University, Columbus, Ohio.

A locally-produced videotape of a teacher using a subject matter expert to present information which you can view for the purpose of critiquing that teacher's performance.

Videotape equipment for viewing a videotaped demonstration.

A local telephone company business office to visit for information about portable conference telephones.

Learning Experience II

Required

A subject matter expert to make a presentation in a simulated situation.

1–5 peers to role-play students to whom the lesson involving the subject matter expert is being presented, and to critique your performance in managing this activity. If peers are unavailable, you may present your lesson to your *resource person*.

Optional

A resource person to evaluate your competency in developing a lesson plan.

A subject matter expert to make a presentation to one of your university classes using the telephone conference technique.

A portable conference telephone with which the expert can make the presentation.

Learning Experience III

Required

An actual school situation in which you can use a subject matter expert to present information.

A resource person to assess your competency in using a subject matter expert to present information.

This module covers performance element numbers 118, 130 from Calvin J. Cotrell *et al.*, *Model Curricula for Vocational and Technical Education: Report No. V* (Columbus, OH: The Center for Vocational Education, The Ohio State University, 1972). The 384 elements in this document form the research base for all The Center's PBTE module development.

For information about the general organization of each module, general procedures for their use, and terminology which is common to all 100 modules, see About Using The Center's PBTE Modules on the inside back cover.

Learning Experience I

OVERVIEW

After completing the required reading, demonstrate knowledge of the rationale and procedures for using a subject matter expert.

You will be reading the information sheet, Using a Subject Matter Expert, pp. 6–14.

You may wish to view the videotape, "Utilize a Subject Matter Expert," or a locally-produced videotape of a teacher using a subject matter expert to present information, and to critique that teacher's performance.

You may wish to visit your local telephone company business office to get information about conference telephone equipment.

You will be demonstrating knowledge of the rationale and procedures for using a subject matter expert by completing the Self-Check, pp. 15–16.

You will be evaluating your competency by comparing your completed Self-Check with the Model Answers, p. 17.

Activity

For information regarding the purposes of using a subject matter expert in the classroom, and the methods of preparing for an expert's presentation, read the following information sheet:

USING A SUBJECT MATTER EXPERT

The overall responsibility for providing the environment in which students can learn is, of course, ultimately that of the vocational teacher. However, the teacher does not have sole responsibility. He/she can draw on a great many aids and sources of assistance. These include physical materials such as books, reference material, visual aids, and a great many other things. As a vocational teacher, you can also get the help of people—education specialists, guidance personnel, the advisory committee, school administrators, and others. An additional important source of assistance, which is generally readily available, is the "subject matter expert."

The subject matter expert (also commonly referred to as a resource person) is a person from the community or the occupational field who has some special knowledge, expertise, or point of view which can be helpful to the vocational student. The fundamental purpose of using a subject matter expert in the classroom is to aid student learning by providing an experience or information that is not available as effectively in any other way. There are a number of ways in which a subject matter expert may fill a need or correct an instructional deficiency in the vocational program.

The subject matter expert may supply up-to-date information to the class and to the teacher. When a teacher is putting all his/her efforts into developing and running a vocational program, it is possible to get somewhat behind in the reading and experience needed for the teacher to keep totally up to date.

In addition, no one teacher is an expert in all possible aspects of the occupation. All of us have things we do better than others. The subject matter expert can be used to supplement the teacher in those areas in which the teacher has less expertise. The subject matter expert can supply current information on recent technical processes, new materials, the latest tools and equipment being used, or changes in occupational demands and practices.

The subject matter expert can relate the work of the vocational classroom to the real world of the occupation. Teachers and students alike may be involved in school activities that seem to be occasionally unrealistic or isolated from trade conditions. Students respond positively to information given them by someone who faces real problems every day and who they feel knows the score. They can gain some satisfaction in finding that their work is leading them to their desired goals.

A presentation by an outside expert provides a break from the normal classroom routine. A fresh approach or an unfamiliar personality can provide the variety that is a basic factor in learning and can increase student interest.

A secondary, but still valuable, outcome is that the participation of a subject matter expert from the community can help to maintain and improve school-community relations. School programs need to be closely related to community concerns. Bringing a subject matter expert into the school can keep communications open and relations good.

Underlying all the above advantages is the benefit of increased student motivation. The student may be motivated to copy the model of excellence presented by the subject matter expert. Motivation may also be provided through the current and realistic information about the occupation presented by the subject matter expert—information to which the student can personally relate.

Using subject matter experts in the classroom rather than having students go out into the com-

munity is also an advantage when the transportation costs and travel time involved in a field trip make the trip impractical. When subject matter experts can provide the needed learning experiences by coming to the vocational classroom, this method of using community resources is an efficient instructional technique.

Kinds of Subject Matter Experts

The term "subject matter expert" may be somewhat misleading. An "expert" is not necessarily a professional lecturer or a high level executive. Well-informed and skilled people may be found in all kinds of places doing all kinds of things. Any community member may well be a subject matter expert concerning a subject he or she knows well.

The mechanic who has owned and run the service station on the corner for the last ten years, the teacher who works at the child care center, and the teller at the local bank, may be subject matter experts who can tell your students something they need to know. The sign painter who has a shop nearby, the aircraft mechanic, the dress designer for the town's clothing manufacturer, may be able to show your students techniques of their trade that the students might never see otherwise.

There may be occasions when the use of two or more subject matter experts together could be most effective. For example, in a lesson on career opportunities, several experts could present the situation from their varying points of view. In this way, the class would get a more balanced picture than if only one expert were present.

In general, the following kinds of people may serve as subject matter experts for vocational programs:

- Skilled craftsmen or experienced workers
- Personnel managers
- Labor experts
- Management personnel
- Researchers
- Technicians
- Government officials working in capacities related to the occupation
- Manufacturer's representatives
- Customers, or members, of the public served by the occupation

Any member of the working world, from any position in the occupation, from the local community or from far away, is a potential candidate to be a subject matter expert. The following brief examples are presented to stimulate your thinking on how subject matter experts might be used in your own occupational specialty.

Personnel Manager.—Your students will be looking for a job either during or after their training in your class. Therefore, it would be very helpful to bring in a person whose job it is to hire people in your field. Personnel managers can tell your students about the traits and qualities they look for when hiring.

Quite often a person working in a particular position cannot tell you exactly why he or she was hired, but personnel managers can. They can tell your students which skills are most important, what kind of experience is most valuable, and what personal qualities are helpful in getting and keeping a job. Personnel managers may also be able to coach your students on how to apply for a position; how to dress for, and behave in, a job interview; and what credentials should be presented.

Labor Market Expert.—In this period of rapidly changing technology and unstable employment conditions, your students need up-to-date and authoritative information about the labor market in their field. A labor expert can tell your students where the job opportunities are, and what the outlook is for the future. In the graphic arts industry, for example, if there are few jobs for lock-up-men, but strippers are in short supply, graphics students should know about it. Students may be encouraged by being sure they are learning a marketable skill, and may find motivation in knowing the latest information about general pay scales.

Skilled Worker.—Vocational teachers in any area may find that there are some aspects of the occupation in which they are not as expert as they would like to be. In this case, the highly skilled worker with some special expertise can be of great value. In cosmetology, for instance, a new hair styling technique may have been recently developed. A skilled stylist could give the class the

latest information or even demonstrate the new technique. An unusual procedure for machining magnesium can be explained to students by a skilled machinist.

If it can be arranged, it is often best for the skilled worker to make a presentation through a demonstration rather than a talk. Not only will this often tend to make the subject matter expert feel more comfortable, but the class usually gets more value out of this type of presentation.

A subject matter expert can show your students the latest techniques being used in the occupation.

Customer.—Everybody, of course, is a customer, but some customers, because of their experience and insight, may have a real contribution to make to vocational students. The auto mechanics student, for example, may find out that there is a lot more to satisfying the customer than being able to bleed brakes or adjust the carburetor.

A really knowledgeable automobile enthusiast may be able to tell the class (1) what kind of help he/she expects from the service advisor, (2) how he or she would like his/her complaints to be handled, and (3) in what condition he or she expects the car to be returned. By listening to customers early in their training, students can save themselves much difficulty on the job and learn to create successful relationships with the public they serve.

As you plan your units and lessons, you may identify numerous other ways to utilize a subject matter expert. You may decide to bring in a subject matter expert to critique the work of a student who is particularly skilled in a given technique. You might call in an expert to tell the class how the quality of their work compares with industry standards. You may ask a master craftsman to demonstrate an unusual craft, such as handcarving of decorative woodwork, that is now almost entirely a machine process. The possibilities for making use of the many people available as subject matter experts are almost limitless.

Determining When to Use a Subject Matter Expert

While there are many possible benefits, the decision to use a subject matter expert in the classroom should be based primarily on whether such a presentation would help to achieve the desired educational objective. If you come to the conclusion that a unique learning experience is required, or that a student need exists that you cannot fill, the next step is to determine what kind of enriching experience would be best.

The options might include using a subject matter expert, taking a field trip, sending students out into the community, showing a film, or some other activity. A field trip might be the best possible experience, but sometimes field trips prove to be impractical or impossible because of the excessive time and cost involved, unavailability of transportation, or inaccessibility of field trip sites. A subject matter expert provides a good alternative means of bringing the world of work into contact with the classroom.

In considering the use of a subject matter expert, you should carefully estimate the contribution the expert could make toward achieving the objective, and whether the advantages of the choice outweigh any possible disadvantages. Some possible disadvantages might be that (1) excessive extra planning and preparation would be involved, (2) there would be an expense involved in hiring the subject matter expert, or (3) the effect that the expert's presentation would have on the class is unknown in advance.

Before deciding to use a subject matter expert in the classroom, you should be sure that the following conditions exist:

- There is a direct relationship between the educational objectives and the expert's presentation.
- The expert can provide a necessary learning experience not otherwise available.

- In-school or community subject matter experts are available.
- Alternative learning experiences will not fulfill the requirements of the objectives as well.
- The subject matter expert is capable of making a valuable presentation to the students.
- Students are capable of learning from the expert's presentation.
- Sufficient time is available to select the expert and plan for the learning experience.
- You have administrative approval for inviting a subject matter expert into your classroom.

Selecting the Subject Matter Expert

The **ideal** subject matter expert has great expertise, poise, and ability to make effective and motivating presentations, and is a desirable model for students to pattern their behavior after. You should search for experts that possess enough of these qualities to make the presentation valuable and effective. The expert should—

- possess the special expertise your students need to help them reach the educational objectives
- have a positive attitude toward students, vocational education, and his/her own occupation
- be able to organize his/her thoughts in such a way that students can comprehend the information presented
- possess sufficient poise and command of the language to speak easily and clearly to a group
- present a general model of excellence worthy of imitation by students
- be available when the students are ready for the presentation

In selecting a subject matter expert, your goal should be to choose the person most qualified to provide the needed learning experience for the students. Students may be involved in the process of deciding what kind of person is needed and in getting leads on where to locate the person.

There are a number of formal and informal methods a teacher may use to locate the required expert, ranging from simply asking around to consulting reference publications. In some school systems there is a comprehensive directory of community resources. Where such a directory is available, it is the best single source of information and should be checked first. In other systems, a staff member may have the responsibility of contacting community groups and individuals who might like to be involved with the school. This person may have a file of potential guest speakers you can check.

If you have no such sources from which to identify experts, there are other ways of locating interested persons. Review Chamber of Commerce publications, check the Yellow Pages for businesses in your occupational area, or contact civic groups, professional organizations, educational organizations, and labor unions. On a more personal basis, you can ask your acquaintances, colleagues, and students to help you locate a subject matter expert. People already in the field may be

able to direct you to an expert they know on transistorized ignition, computerized inventory control, or cake decorating.

Your program advisory committee is also a good source of information which you should not ignore. In addition, in the course of your day-to-day activities, you may encounter a subject matter expert or a lead to finding one. Always be on the lookout for persons who can enrich your classroom activities and keep a file of their names for future reference.

After a suitable person is located, an initial contact will need to be made. At that time, you should explain to the expert in general terms what kind of assistance the class needs. You should also mention a suitable date for the presentation. The expert probably will have some questions and may have some concerns. You should respond to these uncertainties in a brief and straightforward manner.

Most people are justly proud of their knowledge or skill and will be pleased to accept your invitation to assist if it can possibly be arranged. Members of some professional and civic associations are awarded credits by their groups for this kind of service. This gives them additional motivation to help.

Care should be taken to avoid too extensive use of any one person. On the other hand, a qualified person who has agreed to help and is not used may lose interest. It is only reasonable for you to expect some refusals, however, Some people will not be able to spare the time. Others may not feel confident in their ability to make a presentation to a group of students. Some will frankly feel that it is not worth their while to participate.

Planning with the Subject Matter Expert

After the initial agreement is reached, the prospective visitor needs to be given enough information about your class and your program to have an adequate frame of reference from which to plan an appropriate presentation. It is helpful to supply background information about the goals of the program, the present activities of the class, and the kinds of students enrolled. Most important, however, you need to be sure the expert has a clear picture of the purpose of the presentation and the educational objectives it is designed to achieve.

Ultimately, a **written explanation** of the purpose and objectives of the presentation should be given to the expert to avoid any misunderstandings. Once you and your students have cooperatively developed a list of questions that the presentation should answer, this list should also be given to the expert in advance. Be sure to use plain English and not educational jargon.

You may want to make suggestions as to the teaching procedures the expert might use in the presentation. In the case of an expert who is very inexperienced in making presentations, you may need to suggest appropriate techniques or help by providing visual aids.

There are a number of other items that the visitor to the school needs to know about. Though these may seem routine, they should not be forgotten because they are essential to the production of a smooth, useful, and pleasant experience. The visitor should be furnished with the following information:

- the date, time, and exact location of the presentation
- the amount of time that is allotted for the presentation
- agreement as to any special equipment or facilities required
- directions to the school and to the location within the building to which he/she should report, and information about parking

Since in most instances, the subject matter expert will be donating time and effort, you should assume major responsibility for making arrangements and providing facilities and equipment. The expert should generally be considered as a guest in the classroom.

Preparing the Class for the Visit

To enable your students to gain maximum benefit from the expert's presentation, you must give them adequate preparation for the visit. The students themselves can participate in the planning process. The class should be given some background information about the expert, emphasizing (1) his/her particular qualifications, and (2) why he/she was selected to make the presentation at this time. The group should clearly understand what educational objective the expert is expected to help them achieve.

Allow some class time beforehand for students to ask any questions they may have about the presentation. Tell them what they will be expected to do in relation to the presentation (e.g., take notes, prepare a report, answer test questions). Give them a frame of reference to help them understand how the presentation is related to what they have already learned.

The following important items should be considered when the class is preparing for the expert's visit:

- Develop a list of questions to be answered in the course of the presentation and/or discussion; these can be developed cooperatively by students and teacher, and a copy should be given to the expert to aid him/her in planning the presentation.
- Schedule related class activities (e.g., preparation, assignments, etc.) to take place before the expert's visit.
- Provide students with any necessary background materials on the topic to be covered.
- Make sure that students understand what constitutes appropriate student behavior while the guest is present.
- Appoint a student to meet the guest and escort him/her to the class location.
- Prepare students to operate the audio or video equipment if the presentation is to be recorded for future use.

During the Presentation

In order to ensure that the visit can be a success, you should try to create an atmosphere which is free of tension and to encourage each student to be open and receptive to the presentation. With good planning, you should have created the foundation for this atmosphere. Now you will need to strive to maintain it. Make sure that the classroom has been set up as the guest has requested and, if necessary, check to see that any technical equipment and operators needed are ready.

The guest should be introduced to the class. Then, the presentation can be turned over to him/her while you assume the agreed-upon role. You may serve as an observer, moderator, interviewer, or in some other function necessary to the success of the presentation. You must remember that the ultimate responsibility for the class is yours, however. Therefore, if there are any unforeseen hitches, interruptions, or student behavior problems, you will need to take care of them. Any problems should be handled as quickly, pleasantly, and unobtrusively as possible.

If there is to be a class discussion period during or after the presentation, it is your task to keep the discussion focused on the topic and to assist the visitor in handling the students' questions and comments.[1] Encourage the class to ask any questions that they feel will help them. If students begin to ask irrelevant or personal questions (e.g., "How much do you make?"), quickly move the discussion to a safer area. When they have finished, you should ask questions about any important areas which have not been covered.

1. To gain skill in handling class discussions, you may wish to refer to Module C–2, *Conduct Group Discussions, Panel Discussions, and Symposiums.*

The problem of what to do if the subject matter expert fails completely is occasionally a real one. You will need to act decisively in order to save the visitor from acute embarrassment and the class from a waste of time. As much value should be salvaged from the presentation as possible.

This may require you to assume full charge of the situation. Often, simply changing quickly from a formal presentation to a very informal question-and-answer session may save the day. In any case, it is up to you to move with poise and confidence to prevent unnecessary embarrassment on the part of the visiting expert.

Follow-Up

After the expert has left, you should review with the class the significant points or comments made by the expert. Try to relate this information to the other lessons they are studying in the program. Encourage them to attempt to determine how this material relates to, or affects their occupational goals. Summarize the main themes.

This is also the time to have your class evaluate the presentation. Find out if they thought it was helpful to them, what they thought was helpful, and what, if anything, they felt was lacking. Later, you may wish to summarize these comments with your own evaluation of the effectiveness of the presentation. This summary can then be filed to aid you or other teachers in the school in planning future uses of subject matter experts.

During the follow-up session, you and your students could also discuss what additional types of activities should occur as a result of this presentation. Other lessons may be needed to supplement or expand upon the material in the presentation. Students may be interested in planning and completing individual or group projects as a result of something they were made aware of during the presentation.

Finally, it is very important that a letter of appreciation be sent to the expert, thanking him/her for the contribution made. This letter should be prepared by one or more class members. An additional way to show appreciation, and to share the experience with others, is to have an article prepared for the local or school newspaper concerning the presentation.

Using Recordings and Telephone Conferences

When cost, distance, time, or availability make it impossible for a particular subject matter expert to visit your class in person, he/she can still speak to your class through the use of electronics. The expert's message can be presented via an audiotape recording, a videotape recording, or telephone. Each has its advantages and limitations, and each can make a substantial contribution to the instructional program.

Audiotape Recordings

It is relatively easy to make an audiotape recording of the subject matter expert's presentation.[2] A minimum of equipment is required (a good quality portable cassette recorder is adequate), and the technical procedures are fairly simple. Because the expert can be recorded in his/her own surroundings, he/she may feel more relaxed than in a formal setting. The presentation can take the form of an informal interview or a prepared speech.

The obvious limitations of this technique are that there are no visual images and no possibility of interaction between the students and the expert. Visual aids can be used in conjunction with the recording, but they must be carefully coordinated with the presentation in advance. A good quality sound system must be used to play back the tape in the classroom to ensure pleasant listening and accurate understanding.

Videotape Recordings

Making a videotape recording of a subject matter expert's presentation is a more complex undertaking, but the possibilities of the medium are enormous. Almost any teacher who has access to portable videotape recording equipment can learn to operate it well enough to make a simple tape of a talk or interview.[3] Ordinary room lighting and a single microphone are all that are needed.

If the school has a skilled media technician on its staff, it is possible to tape a complex presentation such as a demonstration of a skill or a technical process. In such cases, the videotape has the distinct advantage of allowing extreme close-ups of the expert at work, revealing details that a live demonstration cannot. The tape can be edited to eliminate ineffective sequences, and the completed program can be reused for many classes over a period of time. Of course, interaction between the expert and the students is still not possible.

Portable Conference Telephone

The portable conference telephone is a small, simple device that can be installed in the classroom to amplify a telephone conversation so that it may be heard by an entire group. It also allows any member of the audience to speak to the person at the other end of the line. The portable conference telephone can thus be used to bring the subject matter expert into the class "live," and two-way communication between expert and audience is possible. This arrangement has the obvious advantage of providing a feeling of presence and communication that an audiotape recording cannot match.

Because it makes the expert's presentation to the class almost as simple as picking up the telephone, the opportunities for expert participation are considerably broadened. The expert can come to your classroom instantly from any spot in the country without travel time or expense. Because it involves so little disruption of their normal schedules, a wider variety of people are more likely to be able to participate.

You should plan and prepare for the telephone conference as carefully as for a personal visit by the expert. In addition, both you and the class should familiarize yourselves with the portable conference telephone beforehand. All need to learn how to operate the simple controls and how to use the microphones effectively for the question-and-answer period. The microphones and sound controls should be monitored continuously during the presentation by the teacher-moderator or student-moderator in charge of the unit.

If you plan to make a tape recording of the presentation for later use, you must first obtain the permission of the speaker to do so. Then, during the recording, you will need to add a signal to indicate that a tape is being made.

The equipment itself is a compact, completely portable unit weighing less than 20 pounds. It has a phone handset and two remote microphones to enable the audience to speak to the expert. Costs may vary, but at the time of this writing, a typical charge for the portable conference telephone is $80 for initial charges and $19.25 per month rental. There is no installation charge unless your facility does not have the required four-prong telephone jacks. Regular long distance telephone rates will apply to all calls.

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2. To gain skill in preparing and using audiotapes, you may wish to refer to Module C–26, *Present Information with Audio Recordings.*

3. To gain skills in preparing and using videotapes, you may wish to refer to Module C–27, *Present Information with Televised and Videotaped Materials.*

The conference telephone technique has a great deal of potential for bringing a subject matter expert into the vocational classroom. If you prepare thoroughly for the presentation and supervise the experience adequately, the telephone presentation can be almost as real, as natural, and as beneficial as having a live visitor in the room. The important difference is that the conference telephone technique gives you many more options in choosing a subject matter expert.

Optional Activity

For a view of how one well-organized teacher used a subject matter expert to stimulate his class and bring in current information, you may wish to view the videotape, "Utilize a Subject Matter Expert." This videotape is recommended viewing, especially for persons who have not had classroom teaching experience. Note the efficient way in which the teacher applies techniques for selecting the expert, preparing the class for the presentation, and following up on the experience.

Your institution may have available videotapes showing examples of teachers using subject matter experts to present information. If so, you may wish to view one or more of these videotapes. You might also choose to critique the performance of each teacher in using subject matter experts, using the criteria provided in this module, or critique forms or checklists provided by your resource person.

Optional Activity

For detailed information on the conference telephone service available in your locality, you may wish to visit the business office of your local telephone company. You may be able to obtain printed materials on the portable conference telephone. You should also be able to examine the latest equipment and see how it operates. The service representative can furnish you with the current installation charges and monthly rental rates for your area.

The following items check your comprehension of the material in the information sheet. Using a Subject Matter Expert, pp. 6–14. Each of the five items requires a short essay-type response. Please explain fully, but briefly, and make sure you respond to all parts of each item.

SELF-CHECK

1. As you talk to a prospective subject matter expert about coming to your class to make a presentation, what points could you make that might convince him/her to contribute time and effort to this undertaking?

2. There may be any number of good reasons for using a subject matter expert in the classroom, but what is the primary and overriding reason? Why must this be so?

3. If you locate a valuable subject matter expert who is completely inexperienced in working with students, what can you do as a teacher to help make the presentation a success?

4. In addition to having him/her make a formal presentation or a talk to your students, how could you use a subject matter expert in furthering the work of your class?

5. Why might the use of the conference telephone technique be the best choice in having a subject matter expert give a presentation?

Compare your written responses on the Self-Check with the Model Answers given below. Your responses need not exactly duplicate the model responses; however, you should have covered the same **major** points.

MODEL ANSWERS

1. It is probably not a good idea to make a hard "sales pitch," but a few points may help sway the undecided prospective expert. You can point out to the expert that he/she has an unusual or a very high level skill that students will gain greatly from hearing about. You can indicate that no one else has quite the required qualifications that he/she has.

   You could suggest that by helping a new generation of students, the expert is repaying his/her obligation to those who helped in his/her training period. You may be able to illustrate that there is a great deal of personal satisfaction in working with students. Finally, you can make the expert aware of the fact that he/she may discover some excellent prospective employees through contact with this class.

2. The overriding reason to utilize a subject matter expert in the classroom must be to enable students to achieve the desired educational objectives. All other considerations of student interest, convenience, or variety must be secondary to this primary concern. The educational objectives must be clear. Then, the choice of whether to use an expert or to plan for another instructional approach can be made on a sound basis.

   If there are alternatives, then each can be weighed as to its ability to help reach the objective. If the use of a subject matter expert is clearly required, then you can work out the feasibility of the plan.

3. You can do a great deal by helping the expert select the teaching method and prepare the actual presentation. The approach should be kept simple and informal and the presentation uncomplicated. You can prepare visual aids, gather and set up needed equipment, and in general take a good deal of confusing responsibility from the visitor. In conducting the presentation, you can help by maintaining control and directing the class, thereby reassuring the visitor and allowing him/her to concentrate on the content of the talk.

4. Each occupational subject area may have a number of specialized and unique ways of using a subject matter expert. The expert can help evaluate student projects, act as a judge, give advice to students who are having special technical problems, or work with a small group of very advanced students. The expert could spend a period objectively observing students' work in the laboratory, and then give them a supervisor's reaction to their procedures.

   In some cases, the expert might assume one of the roles he/she actually plays on his/her job, while students take the part of customers or fellow workers. Other approaches might range from a very informal talk session around a table in the school cafeteria to having the expert put on a complete demonstration of a skill for a few observers.

5. If the proposed topic can be dealt with in a talk format, the telephone lecture or conference allows for a great deal of choice on your part. The expert may be selected from any location, and the time constraints are less difficult. Because most experts find telephone conversation easy, even very busy people may not hesitate to accept a teacher's invitation. In many ways, it makes your job less difficult without lessening the value of the presentation in any way.

LEVEL OF PERFORMANCE: Your completed Self-Check should have covered the same **major** points as the model responses. If you missed some points or have questions about any additional points you made, review the material in the information sheet, Using a Subject Matter Expert, pp. 6–14, or check with your resource person if necessary.

NOTES

Learning Experience II

OVERVIEW

In a simulated classroom or laboratory situation, use a subject matter expert to present information.

You will be selecting a student performance objective in your occupational specialty that lends itself to using a subject matter expert to present information.

You will be selecting, modifying, or developing a lesson plan designed to achieve that objective using a subject matter expert to present information.

You may wish to have your resource person review the adequacy of your plan.

You will be selecting a subject matter expert and preparing him/her for the presentation.

You and the subject matter expert will be presenting the lesson to a group of peers, or to your resource person.

Your competency in using a subject matter expert to present information will be evaluated by your peers, or by your resource person, using the Lesson Presentation Checklist, pp. 23–32.

You may wish to arrange for an actual subject matter expert to present information to one of your own university classes using the telephone conference technique.

Select a student performance objective in your occupational specialty which could be achieved, at least partially, by using a subject matter expert to present information. (In a real world situation, you start with an objective and then select the most appropriate materials and/or teaching methods. In this practice situation, however, you need to select an objective that lends itself to using a subject matter expert to present information.)

Prepare a detailed lesson plan which includes an explanation of how the subject matter expert will be used to present information, and how you will prepare the expert and the class for the presentation. The expert's presentation may be one part of the overall lesson or may constitute the entire lesson. Instead of developing a lesson plan, you may select a lesson plan that you have developed previously, and adapt that plan so that it includes the use of a subject matter expert to present information.

You may wish to have your resource person review the adequacy of the plan. He/she could use the Teacher Performance Assessment Form in Module B–4, *Develop a Lesson Plan*, as a guide.

Based on the requirements of your lesson plan, select an appropriate "subject matter expert." This need not be a person outside your immediate school or university environment. Since this is a simulation, it would be preferable to use a peer, colleague, or resource person with the necessary expertise to make an effective presentation. Contact the expert, make arrangements for him or her to make the presentation, and prepare him or her for the presentation.

In a simulated classroom or laboratory situation, prepare a class of one to five peers for the presentation and, with the subject matter expert, present your lesson to the group of peers. These peers will serve two functions: (1) they will role-play the students to whom you and the expert are presenting the lesson, and (2) they will evaluate your performance. If peers are not available to you, you may present your lesson to your resource person.

Multiple copies of the Lesson Presentation Checklist are provided in this learning experience. Give a copy to each peer, or to your resource person, before making the presentation in order to ensure that each knows what to look for in the lesson. However, indicate that during the lesson, all attention is to be directed toward you, and that the checklists are to be completed **after** the lesson is finished.

If you are enrolled in university classes covering professional or technical skills, and if you have access within these classes to a portable conference telephone, you may wish to make use of this situation to gain practice in using the portable conference telephone. At a time when a subject matter expert could be used to help your class to achieve a particular course objective, try to arrange for your professor or instructor to allow you to take over the class temporarily. Locate and make arrangements with an appropriate subject matter expert. Prepare both the expert and the class for the presentation or interview. Set up and test the equipment, monitor or moderate the presentation, and conduct the necessary follow-up activities.

LESSON PRESENTATION CHECKLIST

Directions: Place an X in the NO, PARTIAL, or FULL box to indicate that each of the following performance components was not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

Name _____

Date _____

Resource Person _____

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
In the preparation stage, the teacher:				
1. provided the class with information about the visitor and the objectives of the presentation prior to his/her arrival	☐	☐	☐	☐
2. organized classroom learning activities to lead up to the topic of the subject matter expert's presentation	☐	☐	☐	☐
3. planned cooperatively with the class what responsibilities they would have in terms of taking notes, passing a test, producing a report, etc.	☐	☐	☐	☐
4. informed the class about the standards of behavior which would be expected during the presentation	☐	☐	☐	☐
During the subject matter expert's visit, the teacher:				
5. arranged for the visitor to be greeted and properly introduced to the class	☐	☐	☐	☐
6. maintained control of the group's behavior and took care of routine matters as necessary	☐	☐	☐	☐
7. assisted the visitor in handling the question-and-answer period of the presentation	☐	☐	☐	☐
8. drew the presentation period to a close at the end of the allotted time	☐	☐	☐	☐
Based on the expert's presentation, he/she appeared to have been:				
9. oriented to the purposes and objectives of the presentation	☐	☐	☐	☐
10. given a list of questions that the presentation should answer	☐	☐	☐	☐
11. provided with information about the class and its special needs and/or interests	☐	☐	☐	☐
12. provided with adequate information about the date, time allotted, location of the classroom, and other routine matters	☐	☐	☐	☐
13. adequately provided for in terms of needed facilities or equipment	☐	☐	☐	☐
After the subject matter expert's visit, the teacher:				
14. helped the class summarize the main ideas and points presented by the expert	☐	☐	☐	☐

	N/A	No	Partial	Full
15. related the presentation to past and future classes	☐	☐	☐	☐
16. developed with the help of the class a summary evaluation of the presentation	☐	☐	☐	☐
17. arranged for a formal letter of thanks to be sent to the subject matter expert	☐	☐	☐	☐
Overall:				
18. the use of a subject matter expert seemed to be an appropriate technique based on the objectives of the lesson	☐	☐	☐	☐
19. the subject matter expert possessed the qualities necessary to make a successful presentation	☐	☐	☐	☐
20. the subject matter expert successfully aided students in meeting the lesson objectives	☐	☐	☐	☐

LEVEL OF PERFORMANCE: All items must receive FULL, or N/A responses. If any item receives a NO or PARTIAL response, the teacher and resource person should meet to determine what additional activities the teacher needs to complete in order to reach competency in the weak area(s).

LESSON PRESENTATION CHECKLIST

Directions: Place an X in the NO, PARTIAL, or FULL box to indicate that each of the following performance components was not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

Name _____

Date _____

Resource Person _____

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
In the preparation stage, the teacher:				
1. provided the class with information about the visitor and the objectives of the presentation prior to his/her arrival	☐	☐	☐	☐
2. organized classroom learning activities to lead up to the topic of the subject matter expert's presentation	☐	☐	☐	☐
3. planned cooperatively with the class what responsibilities they would have in terms of taking notes, passing a test, producing a report, etc.	☐	☐	☐	☐
4. informed the class about the standards of behavior which would be expected during the presentation	☐	☐	☐	☐
During the subject matter expert's visit, the teacher:				
5. arranged for the visitor to be greeted and properly introduced to the class	☐	☐	☐	☐
6. maintained control of the group's behavior and took care of routine matters as necessary	☐	☐	☐	☐
7. assisted the visitor in handling the question-and-answer period of the presentation	☐	☐	☐	☐
8. drew the presentation period to a close at the end of the allotted time	☐	☐	☐	☐
Based on the expert's presentation, he/she appeared to have been:				
9. oriented to the purposes and objectives of the presentation	☐	☐	☐	☐
10. given a list of questions that the presentation should answer	☐	☐	☐	☐
11. provided with information about the class and its special needs and/or interests	☐	☐	☐	☐
12. provided with adequate information about the date, time allotted, location of the classroom, and other routine matters	☐	☐	☐	☐
13. adequately provided for in terms of needed facilities or equipment	☐	☐	☐	☐
After the subject matter expert's visit, the teacher:				
14. helped the class summarize the main ideas and points presented by the expert	☐	☐	☐	☐

	N/A	No	Partial	Full
15. related the presentation to past and future classes	☐	☐	☐	☐
16. developed with the help of the class a summary evaluation of the presentation	☐	☐	☐	☐
17. arranged for a formal letter of thanks to be sent to the subject matter expert	☐	☐	☐	☐
Overall:				
18. the use of a subject matter expert seemed to be an appropriate technique based on the objectives of the lesson	☐	☐	☐	☐
19. the subject matter expert possessed the qualities necessary to make a successful presentation	☐	☐	☐	☐
20. the subject matter expert successfully aided students in meeting the lesson objectives	☐	☐	☐	☐

LEVEL OF PERFORMANCE: All items must receive FULL, or N/A responses. If any item receives a NO or PARTIAL response, the teacher and resource person should meet to determine what additional activities the teacher needs to complete in order to reach competency in the weak area(s).

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Date _____

Resource Person _____

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
In the preparation stage, the teacher:				
1. provided the class with information about the visitor and the objectives of the presentation prior to his/her arrival	☐	☐	☐	☐
2. organized classroom learning activities to lead up to the topic of the subject matter expert's presentation	☐	☐	☐	☐
3. planned cooperatively with the class what responsibilities they would have in terms of taking notes, passing a test, producing a report, etc.	☐	☐	☐	☐
4. informed the class about the standards of behavior which would be expected during the presentation	☐	☐	☐	☐
During the subject matter expert's visit, the teacher:				
5. arranged for the visitor to be greeted and properly introduced to the class	☐	☐	☐	☐
6. maintained control of the group's behavior and took care of routine matters as necessary	☐	☐	☐	☐
7. assisted the visitor in handling the question-and-answer period of the presentation	☐	☐	☐	☐
8. drew the presentation period to a close at the end of the allotted time	☐	☐	☐	☐
Based on the expert's presentation, he/she appeared to have been:				
9. oriented to the purposes and objectives of the presentation	☐	☐	☐	☐
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11. provided with information about the class and its special needs and/or interests	☐	☐	☐	☐
12. provided with adequate information about the date, time allotted, location of the classroom, and other routine matters	☐	☐	☐	☐
13. adequately provided for in terms of needed facilities or equipment	☐	☐	☐	☐
After the subject matter expert's visit, the teacher:				
14. helped the class summarize the main ideas and points presented by the expert	☐	☐	☐	☐

	N/A	No	Partial	Full
15. related the presentation to past and future classes	☐	☐	☐	☐
16. developed with the help of the class a summary evaluation of the presentation	☐	☐	☐	☐
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Overall:				
18. the use of a subject matter expert seemed to be an appropriate technique based on the objectives of the lesson	☐	☐	☐	☐
19. the subject matter expert possessed the qualities necessary to make a successful presentation	☐	☐	☐	☐
20. the subject matter expert successfully aided students in meeting the lesson objectives	☐	☐	☐	☐

LEVEL OF PERFORMANCE: All items must receive FULL, or N/A responses. If any item receives a NO or PARTIAL response, the teacher and resource person should meet to determine what additional activities the teacher needs to complete in order to reach competency in the weak area(s).

LESSON PRESENTATION CHECKLIST

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Resource Person _____

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
In the preparation stage, the teacher:				
1. provided the class with information about the visitor and the objectives of the presentation prior to his/her arrival	☐	☐	☐	☐
2. organized classroom learning activities to lead up to the topic of the subject matter expert's presentation	☐	☐	☐	☐
3. planned cooperatively with the class what responsibilities they would have in terms of taking notes, passing a test, producing a report, etc.	☐	☐	☐	☐
4. informed the class about the standards of behavior which would be expected during the presentation	☐	☐	☐	☐
During the subject matter expert's visit, the teacher:				
5. arranged for the visitor to be greeted and properly introduced to the class	☐	☐	☐	☐
6. maintained control of the group's behavior and took care of routine matters as necessary	☐	☐	☐	☐
7. assisted the visitor in handling the question-and-answer period of the presentation	☐	☐	☐	☐
8. drew the presentation period to a close at the end of the allotted time	☐	☐	☐	☐
Based on the expert's presentation, he/she appeared to have been:				
9. oriented to the purposes and objectives of the presentation	☐	☐	☐	☐
10. given a list of questions that the presentation should answer	☐	☐	☐	☐
11. provided with information about the class and its special needs and/or interests	☐	☐	☐	☐
12. provided with adequate information about the date, time allotted, location of the classroom, and other routine matters	☐	☐	☐	☐
13. adequately provided for in terms of needed facilities or equipment	☐	☐	☐	☐
After the subject matter expert's visit, the teacher:				
14. helped the class summarize the main ideas and points presented by the expert	☐	☐	☐	☐

	N/A	No	Partial	Full
15. related the presentation to past and future classes	☐	☐	☐	☐
16. developed with the help of the class a summary evaluation of the presentation	☐	☐	☐	☐
17. arranged for a formal letter of thanks to be sent to the subject matter expert	☐	☐	☐	☐
Overall:				
18. the use of a subject matter expert seemed to be an appropriate technique based on the objectives of the lesson	☐	☐	☐	☐
19. the subject matter expert possessed the qualities necessary to make a successful presentation	☐	☐	☐	☐
20. the subject matter expert successfully aided students in meeting the lesson objectives	☐	☐	☐	☐

LEVEL OF PERFORMANCE: All items must receive FULL, or N/A responses. If any item receives a NO or PARTIAL response, the teacher and resource person should meet to determine what additional activities the teacher needs to complete in order to reach competency in the weak area(s).

LESSON PRESENTATION CHECKLIST

Directions: Place an X in the NO, PARTIAL, or FULL box to indicate that each of the following performance components was not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

Name _____

Date _____

Resource Person _____

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
In the preparation stage, the teacher:				
1. provided the class with information about the visitor and the objectives of the presentation prior to his/her arrival	☐	☐	☐	☐
2. organized classroom learning activities to lead up to the topic of the subject matter expert's presentation	☐	☐	☐	☐
3. planned cooperatively with the class what responsibilities they would have in terms of taking notes, passing a test, producing a report, etc.	☐	☐	☐	☐
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During the subject matter expert's visit, the teacher:				
5. arranged for the visitor to be greeted and properly introduced to the class	☐	☐	☐	☐
6. maintained control of the group's behavior and took care of routine matters as necessary	☐	☐	☐	☐
7. assisted the visitor in handling the question-and-answer period of the presentation	☐	☐	☐	☐
8. drew the presentation period to a close at the end of the allotted time	☐	☐	☐	☐
Based on the expert's presentation, he/she appeared to have been:				
9. oriented to the purposes and objectives of the presentation	☐	☐	☐	☐
10. given a list of questions that the presentation should answer	☐	☐	☐	☐
11. provided with information about the class and its special needs and/or interests	☐	☐	☐	☐
12. provided with adequate information about the date, time allotted, location of the classroom, and other routine matters	☐	☐	☐	☐
13. adequately provided for in terms of needed facilities or equipment	☐	☐	☐	☐
After the subject matter expert's visit, the teacher:				
14. helped the class summarize the main ideas and points presented by the expert	☐	☐	☐	☐

	N/A	No	Partial	Full
15. related the presentation to past and future classes	☐	☐	☐	☐
16. developed with the help of the class a summary evaluation of the presentation	☐	☐	☐	☐
17. arranged for a formal letter of thanks to be sent to the subject matter expert	☐	☐	☐	☐
Overall:				
18. the use of a subject matter expert seemed to be an appropriate technique based on the objectives of the lesson	☐	☐	☐	☐
19. the subject matter expert possessed the qualities necessary to make a successful presentation	☐	☐	☐	☐
20. the subject matter expert successfully aided students in meeting the lesson objectives	☐	☐	☐	☐

LEVEL OF PERFORMANCE: All items must receive FULL, or N/A responses. If any item receives a NO or PARTIAL response, the teacher and resource person should meet to determine what additional activities the teacher needs to complete in order to reach competency in the weak area(s).

Learning Experience III

FINAL EXPERIENCE

In an **actual school situation***, use a subject matter expert to present information.

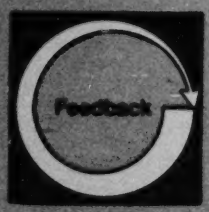
As you plan your lessons, decide when using a subject matter expert to present information could be used effectively to aid in meeting the lesson objectives. Based on that decision, use a subject matter expert to present information. This will include—

- selecting, modifying, or developing a lesson plan which includes the use of this technique
- selecting, contacting, securing, and preparing an appropriate subject matter expert
- preparing the students for the expert's presentation
- arranging the setting and securing needed equipment
- presenting the lesson with the subject matter expert
- conducting needed follow-up activities

NOTE: As you complete each of the preliminary activities above, document your actions (in writing, on tape, through a log) for assessment purposes.

Your resource person may want you to submit your written lesson plan to him/her for evaluation before you present the lesson. It may be helpful for your resource person to use the TPAF from Module B–4, *Develop a Lesson Plan*, to guide his/her evaluation.

You may also wish to plan and conduct a presentation using a subject matter expert in a telephone conference situation. If you choose to do this, arrange in advance to have your resource person observe your performance.



Arrange in advance for your resource person to review your documentation and observe the lesson presentation.

Your total competency will be assessed by your resource person, using the Teacher Performance Assessment Form, pp. 35–36.

Based upon the criteria specified in this assessment instrument, your resource person will determine whether you are competent in using a subject matter expert to present information.

*For a definition of "actual school situation," see the inside back cover.

NOTES

TEACHER PERFORMANCE ASSESSMENT FORM

Use Subject Matter Experts to Present Information (C–20)

Name _____

Date _____

Resource Person _____

Directions: Indicate the level of the teacher's accomplishment by placing an X in the appropriate box under the LEVEL OF PERFORMANCE heading. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

	LEVEL OF PERFORMANCE					
	N/A	None	Poor	Fair	Good	Excellent
In the decision and selection stage, the teacher:						
1. made the decision to use a subject matter expert on educationally sound bases	☐	☐	☐	☐	☐	☐
2. selected a subject matter expert who appeared to have the qualities necessary to make a successful presentation	☐	☐	☐	☐	☐	☐
3. secured administrative approval for using the expert	☐	☐	☐	☐	☐	☐
In the planning and preparation stage, the teacher:						
4. oriented the subject matter expert to the purposes and objectives of the proposed presentation	☐	☐	☐	☐	☐	☐
5. prepared with students a list of questions that should be answered by the expert's presentation	☐	☐	☐	☐	☐	☐
6. provided the expert with information about the class and its special needs and/or interests	☐	☐	☐	☐	☐	☐
7. provided the subject matter expert with information about the date, time allotted, location of the classroom, and other routine matters	☐	☐	☐	☐	☐	☐
8. assisted the expert in selecting techniques or preparing the presentation if necessary	☐	☐	☐	☐	☐	☐
9. arranged for any special equipment or classroom facilities as required by the presentation or requested by the expert	☐	☐	☐	☐	☐	☐
10. provided the class with information about the visitor and the objectives of the presentation prior to his/her arrival	☐	☐	☐	☐	☐	☐
11. organized classroom learning activities to lead up to the topic of the subject matter expert's presentation	☐	☐	☐	☐	☐	☐
12. planned cooperatively with the class the responsibilities which they would have in terms of taking notes, passing a test, producing a report, etc.	☐	☐	☐	☐	☐	☐

	N/A	None	Poor	Fair	Good	Excellent
13. informed the class about the standards of behavior which would be expected during the presentation ...	☐	☐	☐	☐	☐	☐
During the subject matter expert's visit, the teacher:						
14. arranged for the visitor to be greeted and properly introduced to the class	☐	☐	☐	☐	☐	☐
15. maintained control of the group's behavior and took care of routine matters as necessary	☐	☐	☐	☐	☐	☐
16. assisted the visitor in handling the question-and-answer period of the presentation	☐	☐	☐	☐	☐	☐
17. drew the presentation period to a close at the end of the allotted time	☐	☐	☐	☐	☐	☐
After the subject matter expert's visit, the teacher:						
18. helped the class summarize the main ideas and points presented by the expert	☐	☐	☐	☐	☐	☐
19. related the presentation to what the class had already learned and to future learning	☐	☐	☐	☐	☐	☐
20. developed with the help of the class a summary evaluation of the presentation	☐	☐	☐	☐	☐	☐
21. arranged for a formal letter of thanks to be sent to the subject matter expert	☐	☐	☐	☐	☐	☐

LEVEL OF PERFORMANCE: All items must receive N/A, GOOD, or EXCELLENT responses. If any item receives a NONE, POOR, or FAIR response, the teacher and resource person should meet to determine what additional activities the teacher needs to complete in order to reach competency in the weak area(s).

ABOUT USING THE CENTER'S PBTE MODULES

Organization

Each module is designed to help you gain competency in a particular skill area considered important to teaching success. A module is made up of a series of learning experiences, some providing background information, some providing practice experiences, and others combining these two functions. Completing these experiences should **enable** you to achieve the **terminal** objective in the final learning experience. The final experience in each module always requires you to demonstrate the skill in an actual school situation when you are an intern, a student teacher, or an inservice teacher.

Procedures

Modules are designed to allow you to individualize your teacher education program. You need to take only those modules covering skills which you do not already possess. Similarly, you need not complete any learning experience within a module if you already have the skill needed to complete it. Therefore, before taking any module, you should carefully review (1) the Introduction, (2) the Objectives listed on p. 4, (3) the Overviews preceding each learning experience, and (4) the Final Experience. After comparing your present needs and competencies with the information you have read in these sections, you should be ready to make one of the following decisions:

- that you do not have the competencies indicated, and should complete the entire module
- that you are competent in one or more of the enabling objectives leading to the final learning experience, and thus can omit that (those) learning experience(s)
- that you are already competent in this area, and ready to complete the final learning experience in order to "test out"
- that the module is inappropriate to your needs at this time

When you are ready to take the final learning experience and have access to an actual school situation, make the necessary arrangements with your resource person. If you do not complete the final experience successfully, meet with your resource person and arrange (1) to repeat the experience, or (2) complete (or review) previous sections of the module or other related activities suggested by your resource person before attempting to repeat the final experience.

Options for recycling are also available in each of the learning experiences preceding the final experience. Any time you do not meet the minimum level of performance required to meet an objective, you and your resource person may meet to select activities to help you reach competency. This could involve (1) completing parts of the module previously skipped; (2) repeating activities: (3) reading supplementary resources or completing additional activities suggested by the resource person; (4) designing your own learning experience; or (5) completing some other activity suggested by you or your resource person.

Terminology

Actual School Situation . . . refers to a situation in which you are actually working with, and responsible for, secondary or post-secondary vocational students in a real school. An intern, a student teacher, or an in-service teacher would be functioning in an actual school situation. If you do **not** have access to an actual school situation when you are taking the module, you can complete the module **up to** the final learning experience. You would then do the final learning experience later; i.e., when you have access to an actual school situation.

Alternate Activity or Feedback . . . refers to an item or feedback device which may **substitute** for required items which, due to special circumstances, you are unable to complete.

Occupational Specialty . . . refers to a specific area of preparation within a vocational service area (e.g., the service area Trade and Industrial Education includes occupational specialties such as automobile mechanics, welding, and electricity).

Optional Activity or Feedback . . . refers to an item which is not required, but which is designed to **supplement** and enrich the required items in a learning experience.

Resource Person . . . refers to the person in charge of your educational program; the professor, instructor, administrator, supervisor, or cooperating/supervising/classroom teacher who is guiding you in taking this module.

Student . . . refers to the person who is enrolled and receiving instruction in a secondary or post-secondary educational institution.

Vocational Service Area . . . refers to a major vocational field: agricultural education, business and office education, distributive education, health occupations education, home economics education, industrial arts education, technical education, or trade and industrial education.

You or the Teacher . . . refers to the person who is taking the module.

Levels of Performance for Final Assessment

N/A . . . The criterion was not met because it was **not applicable** to the situation.
None . . . **No attempt** was made to meet the criterion, although it was relevent.
Poor . . . The teacher is unable to perform this skill or has only **very limited ability** to perform it.
Fair . . . The teacher is unable to perform this skill in an acceptable manner, but has **some ability** to perform it.
Good . . . The teacher is able to perform this skill in an **effective** manner.
Excellent . . . The teacher is able to perform this skill in a **very effective** manner.

Titles of The Center's Performance-Based Teacher Education Modules

Category A: Program Planning, Development, and Evaluation

- A–1 Prepare for a Community Survey
- A–2 Conduct a Community Survey
- A–3 Report the Findings of a Community Survey
- A–4 Organize an Occupational Advisory Committee
- A–5 Maintain an Occupational Advisory Committee
- A–6 Develop Program Goals and Objectives
- A–7 Conduct an Occupational Analysis
- A–8 Develop a Course of Study
- A–9 Develop Long-Range Program Plans
- A–10 Conduct a Student Follow-Up Study
- A–11 Evaluate Your Vocational Program

Category B: Instructional Planning

- B–1 Determine Needs and Interests of Students
- B–2 Develop Student Performance Objectives
- B–3 Develop a Unit of Instruction
- B–4 Develop a Lesson Plan
- B–5 Select Student Instructional Materials
- B–6 Prepare Teacher-Made Instructional Materials

Category C: Instructional Execution

- C–1 Direct Field Trips
- C–2 Conduct Group Discussions, Panel Discussions, and Symposiums
- C–3 Employ Brainstorming, Buzz Group, and Question Box Techniques
- C–4 Direct Students in Instructing Other Students
- C–5 Employ Simulation Techniques
- C–6 Guide Student Study
- C–7 Direct Student Laboratory Experience
- C–8 Direct Students in Applying Problem-Solving Techniques
- C–9 Employ the Project Method
- C–10 Introduce a Lesson
- C–11 Summarize a Lesson
- C–12 Employ Oral Questioning Techniques
- C–13 Employ Reinforcement Techniques
- C–14 Provide Instruction for Slower and More Capable Learners
- C–15 Present an Illustrated Talk
- C–16 Demonstrate a Manipulative Skill
- C–17 Demonstrate a Concept or Principle
- C–18 Individualize Instruction
- C–19 Employ the Team Teaching Approach
- C–20 Use Subject Matter Experts to Present Information
- C–21 Prepare Bulletin Boards and Exhibits
- C–22 Present Information with Models, Real Objects, and Flannel Boards
- C–23 Present Information with Overhead and Opaque Materials
- C–24 Present Information with Filmstrips and Slides
- C–25 Present Information with Films
- C–26 Present Information with Audio Recordings
- C–27 Present Information with Televised and Videotaped Materials
- C–28 Employ Programmed Instruction
- C–29 Present Information with the Chalkboard and Flip Chart

Category D: Instructional Evaluation

- D–1 Establish Student Performance Criteria
- D–2 Assess Student Performance: Knowledge
- D–3 Assess Student Performance: Attitudes
- D–4 Assess Student Performance: Skills
- D–5 Determine Student Grades
- D–6 Evaluate Your Instructional Effectiveness

Category E: Instructional Management

- E–1 Project Instructional Resource Needs
- E–2 Manage Your Budgeting and Reporting Responsibilities
- E–3 Arrange for Improvement of Your Vocational Facilities
- E–4 Maintain a Filing System
- E–5 Provide for Student Safety
- E–6 Provide for the First Aid Needs of Students
- E–7 Assist Students in Developing Self-Discipline
- E–8 Organize the Vocational Laboratory
- E–9 Manage the Vocational Laboratory

Category F: Guidance

- F–1 Gather Student Data Using Formal Data-Collection Techniques
- F–2 Gather Student Data Through Personal Contacts
- F–3 Use Conferences to Help Meet Student Needs
- F–4 Provide Information on Educational and Career Opportunities
- F–5 Assist Students in Applying for Employment or Further Education

Category G: School-Community Relations

- G–1 Develop a School-Community Relations Plan for Your Vocational Program
- G–2 Give Presentations to Promote Your Vocational Program
- G–3 Develop Brochures to Promote Your Vocational Program
- G–4 Prepare Displays to Promote Your Vocational Program
- G–5 Prepare News Releases and Articles Concerning Your Vocational Program
- G–6 Arrange for Television and Radio Presentations Concerning Your Vocational Program
- G–7 Conduct an Open House
- G–8 Work with Members of the Community
- G–9 Work with State and Local Educators
- G–10 Obtain Feedback about Your Vocational Program

Category H: Student Vocational Organization

- H–1 Develop a Personal Philosophy Concerning Student Vocational Organizations
- H–2 Establish a Student Vocational Organization
- H–3 Prepare Student Vocational Organization Members for Leadership Roles
- H–4 Assist Student Vocational Organization Members in Developing and Financing a Yearly Program of Activities
- H–5 Supervise Activities of the Student Vocational Organization
- H–6 Guide Participation in Student Vocational Organization Contests

Category I: Professional Role and Development

- I–1 Keep Up-to-Date Professionally
- I–2 Serve Your Teaching Profession
- I–3 Develop an Active Personal Philosophy of Education
- I–4 Serve the School and Community
- I–5 Obtain a Suitable Teaching Position
- I–6 Provide Laboratory Experiences for Prospective Teachers
- I–7 Plan the Student Teaching Experience
- I–8 Supervise Student Teachers

Category J: Coordination of Cooperative Education

- J–1 Establish Guidelines for Your Cooperative Vocational Program
- J–2 Manage the Attendance, Transfers, and Terminations of Co-Op Students
- J–3 Enroll Students in Your Co-Op Program
- J–4 Secure Training Stations for Your Co-Op Program
- J–5 Place Co-Op Students on the Job
- J–6 Develop the Training Ability of On-the-Job Instructors
- J–7 Coordinate On-the-Job Instruction
- J–8 Evaluate Co-Op Students' On-the-Job Performance
- J–9 Prepare for Students' Related Instruction
- J–10 Supervise an Employer-Employee Appreciation Event

RELATED PUBLICATIONS

- Student Guide to Using Performance-Based Teacher Education Materials
- Resource Person Guide to Using Performance-Based Teacher Education Materials
- Guide to the Implementation of Performance-Based Teacher Education

For information regarding availability and prices of these materials contact—

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